

14 FEB 1975

OFFICE OF FINANCE NOTICE NO. 4-75

SUBJECT: Office of Finance Competitive Evaluation System

I. POLICY

It is the policy of the Office of Finance:

- A. That careerists under its jurisdiction for career management be competitively ranked by grade levels, and that the competitive ranking lists be used as the basis for promotions, career counseling and assignments;
- B. That competitive evaluations be conducted and computed at least annually;
- C. That the criteria of the evaluation system be reviewed annually by the Career Board in order to maintain its relevancy to the management needs of the Office of Finance;
- D. That the criteria used for competitive evaluation purposes be published and be readily available to all careerists.
- E. That marginal employees be so notified and be counseled as to how they can improve their competitive standing.

II. OBJECTIVES

The objectives of the Competitive Evaluation System are:

- A. To provide a mechanism by which all MF Careerists will be competitively evaluated and ranked;
- B. To identify those individuals who merit career advancement either in terms of promotion or assignment;
- C. To provide relevant data to assist Management in identifying MF Careerists for development, assignment, training and counseling.

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III. EVALUATION PROCEDURES

- A. MF Careerists have the opportunity to pursue many and varied career paths. For this reason, the Board has requested that the respective panels evaluate the professional careerists in terms of actual experience as well as potential in the following fields of endeavor:

General Finance - Each panel to develop criteria to be evaluated based on the grade level of careerists being rated.

Budget - Experience gained in Budget Formulation and execution both in the field and at headquarters.

Audit - The degree of expertise expected of a careerist in this field varies. Each panel to determine the criteria to be evaluated based on the grade level of careerists being rated.

Systems - Assignments involving systems or procedures analysis and/or development and development of computer applications.

Monetary - Experience acquired as a result of either headquarters or field assignments.

General Support - Experience acquired as a result of overseas/ headquarters assignments.

- B. In rating non-professional careerists assigned to the main office, the following skills are evaluated, which are self-explanatory:

Payroll	Audit
Travel	Monetary
Accounting	

Careerists in the Secretarial field are evaluated based on the following skills:

Typing	Filing
Shorthand	

- C. Fitness reports are the basic tools used by the evaluation panels. The individual Career Panels are responsible during the course of the evaluating process, for taking into consideration the characteristics listed below, as appropriate, in relation to the grade of the employee:

- Acceptance of responsibility
- Effectiveness of oral and written expression
- Ability to think clearly
- Supervisory effectiveness
- Contribution to EEO
- Initiative
- Productivity
- Quality of work
- Resourcefulness
- Demeanor
- Cooperation
- Cost Consciousness
- Versatility
- Creativity
- Decisiveness
- Maturity
- Mobility

Although the Fitness Report is the basic tool, all panel members are provided with the following information pertaining to each careerist:

- Grade of Current Position
- Date of Grade
- Year of Birth
- Formal Education (above high school)
- Internal and External Training Courses
- Overseas Service

- D. The two most recent fitness reports are the primary tools used by the respective panels to evaluate performance. However, if the current reports are not considered to be representative, prior fitness reports are also available for use by the respective panels during the evaluation process.

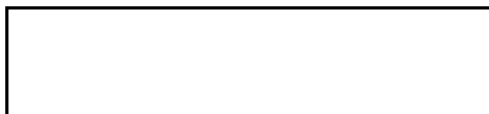
IV. PRODUCT

The Director of Finance has charged the individual career panels with the responsibility for:

- Recommending promotions
- Recommending training
- Recommending assignments
- Assessing growth potential
- Preparing Competitive Evaluation Listings by ranking careerists in the following categories:

- Group I : Promotability of two or more grades.
- Group II : Promotability of at least one more grade.
- Group III: Unless a change takes place, promotion possibility is limited.
- Group IV : Employee offers limited value to the Career Service.

The Career Board's responsibilities are outlined in OFN 20-12-74. The Career Board and Panels are interested in developing criteria most appropriate in evaluating Finance Careerists and will continue to make revisions that are considered valuable in the competitive evaluation process. Any comments or proposals that members of the MF Career Subgroup have concerning revisions or additions to the criteria should be referred to the Executive Officer/Office of Finance. Such information will be reviewed and considered by the Career Board prior to any further revisions to the criteria.



Thomas B. Yale
Director of Finance

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